Fiscal Year 2016-17	Business Unit 0530	Department California Health and Human Services Agency	Priority No. 1

Budget Request Name 0530-002-BCP-BR-2016-GB	Program 0290- Office of Systems Integration	Subprogram

Budget Request Description
California Healthcare Eligibility, Enrollment and Retention System (CalHEERS)
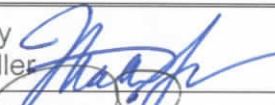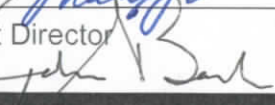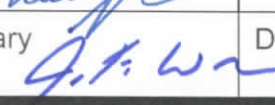
Budget Request Summary

This Budget Change Proposal (BCP) requests an increase of $8.0M in Office of Systems Integration (OSI) expenditure authority and 2.0 permanent positions in 2016-17 related to the transfer of 58.0 project staff to OSI from Covered California.

The increase of $8.0M is necessary to support the continued activities for the California Healthcare Eligibility, Enrollment and Retention System (CalHEERS). Of this amount, $7,742,125 is related to the transfer of 58.0 project staff positions from Covered California to OSI and the remaining $265,201 is for new administrative positions.

Requires Legislation	Code Section(s) to be Added/Amended/Repealed
☐ Yes ☒ No	

Does this BCP contain information technology (IT) components? ☒ Yes ☐ No	Department CIO Dave Patch	Date 11-20-15
If yes, departmental Chief Information Officer must sign.		

For IT requests, specify the date a Special Project Report (SPR) or Feasibility Study Report (FSR) was approved by the Department of Technology, or previously by the Department of Finance.

☐ FSR   ☐ SPR   Project No. N/A   Date: N/A
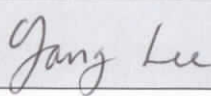
If proposal affects another department, does other department concur with proposal?   ☐ Yes   ☐ No
Attach comments of affected department, signed and dated by the department director or designee.

Prepared By Matt Schueller	Date 11/17/15	Reviewed By Matt Schueller	Date 11/17/15
Department Director John Boule	Date 12/23/15	Agency Secretary Diana Dooley	Date 12/28/15

Department of Finance Use Only

Additional Review: ☐ Capital Outlay ☒ ITCU ☐ FSCU ☐ OSAE ☐ CALSTARS ☐ Dept. of Technology

BCP Type: ☐ Policy   ☒ Workload Budget per Government Code 13308.05

PPBA Yang Lee	Date submitted to the Legislature 1-7-16

BCP Fiscal Detail Sheet

BCP Title: California Healthcare Eligibility, Enrollment and Retention System (CalHEERS)   DP Name: 0530-002-BCP-DP-2016-GB

Budget Request Summary

		FY16				
	CY	BY	BY+1	BY+2	BY+3	BY+4
Positions - Permanent	0.0	60.0	60.0	60.0	60.0	60.0
Total Positions	**0.0**	**60.0**	**60.0**	**60.0**	**60.0**	**60.0**
Salaries and Wages						
Earnings - Permanent	0	4,793	4,793	4,793	4,793	4,793
Total Salaries and Wages	**$0**	**$4,793**	**$4,793**	**$4,793**	**$4,793**	**$4,793**
Total Staff Benefits	0	2,316	2,316	2,316	2,316	2,316
Total Personal Services	**$0**	**$7,109**	**$7,109**	**$7,109**	**$7,109**	**$7,109**
Operating Expenses and Equipment						
5301 - General Expense	0	608	608	608	608	608
5302 - Printing	0	14	14	14	14	14
5304 - Communications	0	97	97	97	97	97
5320 - Travel: In-State	0	100	100	100	100	100
5322 - Training	0	59	59	59	59	59
5324 - Facilities Operation	0	20	20	20	20	20
Total Operating Expenses and Equipment	**$0**	**$898**	**$898**	**$898**	**$898**	**$898**
Total Budget Request	**$0**	**$8,007**	**$8,007**	**$8,007**	**$8,007**	**$8,007**

Fund Summary

Fund Source - State Operations	CY	BY	BY+1	BY+2	BY+3	BY+4
9745 - California Health and Human Services	0	8,007	8,007	8,007	8,007	8,007
Total State Operations Expenditures	**$0**	**$8,007**	**$8,007**	**$8,007**	**$8,007**	**$8,007**
Total All Funds	**$0**	**$8,007**	**$8,007**	**$8,007**	**$8,007**	**$8,007**

Program Summary

Program Funding	CY	BY	BY+1	BY+2	BY+3	BY+4
0290 - Office of Systems Integration	0	8,007	8,007	8,007	8,007	8,007
Total All Programs	**$0**	**$8,007**	**$8,007**	**$8,007**	**$8,007**	**$8,007**

Personal Services Details

Positions		Salary Information			CY	BY	BY+1	BY+2	BY+3	BY+4
		Min	Mid	Max						
1139 -	Office Techn (Typing) (Eff. 07-01-2016)	$2,809	$3,162	$3,515	0.0	1.0	1.0	1.0	1.0	1.0
1312 -	Staff Info Sys Analyst (Spec) (Eff. 07-01-	$5,295	$6,129	$6,963	0.0	18.0	18.0	18.0	18.0	18.0
1337 -	Sr Info Sys Analyst (Spec) (Eff. 07-01-	$5,824	$6,740	$7,655	0.0	17.0	17.0	17.0	17.0	17.0
1340 -	Sr Info Sys Analyst (Supvr) (Eff. 07-01-	$6,116	$7,078	$8,039	0.0	4.0	4.0	4.0	4.0	4.0
1367 -	Sys Software Spec III (Tech) (Eff. 07-01-	$6,388	$7,392	$8,396	0.0	3.0	3.0	3.0	3.0	3.0
1373 -	Sys Software Spec II (Tech) (Eff. 07-01-	$5,814	$6,728	$7,642	0.0	1.0	1.0	1.0	1.0	1.0
1387 -	Dp Mgr IV (Eff. 07-01-2016)	$8,182	$8,969	$9,756	0.0	2.0	2.0	2.0	2.0	2.0
1393 -	Dp Mgr III (Eff. 07-01-2016)	$7,442	$8,157	$8,872	0.0	4.0	4.0	4.0	4.0	4.0
1470 -	Assoc Info Sys Analyst (Spec) (Eff. 07-01-	$4,829	$5,590	$6,350	0.0	1.0	1.0	1.0	1.0	1.0
1559 -	Sys Software Spec III (Supvry) (Eff. 07-01-	$6,708	$7,763	$8,817	0.0	1.0	1.0	1.0	1.0	1.0
1728 -	Exec Asst (Eff. 07-01-2016)	$3,438	$3,871	$4,303	0.0	1.0	1.0	1.0	1.0	1.0
4800 -	Staff Svcs Mgr I (Eff. 07-01-2016)	$5,311	$5,955	$6,598	0.0	1.0	1.0	1.0	1.0	1.0
4802 -	Staff Svcs Mgr III (Eff. 07-01-2016)	$7,088	$7,568	$8,048	0.0	2.0	2.0	2.0	2.0	2.0
5142 -	Assoc Pers Analyst (Eff. 07-01-2016)	$4,600	$5,179	$5,758	0.0	0.5	0.5	0.5	0.5	0.5
5157 -	Staff Svcs Analyst (Gen) (Eff. 07-01-2016)	$2,945	$3,867	$4,788	0.0	1.0	1.0	1.0	1.0	1.0
5284 -	Assoc Budget Analyst (Eff. 07-01-2016)	$4,600	$5,179	$5,758	0.0	0.5	0.5	0.5	0.5	0.5
5393 -	Assoc Govtl Program Analyst (Eff. 07-01-	$4,600	$5,179	$5,758	0.0	1.0	1.0	1.0	1.0	1.0
6075 -	Info Tech - Proj Director (Eff. 07-01-2016)	$8,760	$11,047	$13,333	0.0	1.0	1.0	1.0	1.0	1.0
Total Positions					**0.0**	**60.0**	**60.0**	**60.0**	**60.0**	**60.0**

Salaries and Wages		CY	BY	BY+1	BY+2	BY+3	BY+4
1139 -	Office Techn (Typing) (Eff. 07-01-2016)	0	38	38	38	38	38
1312 -	Staff Info Sys Analyst (Spec) (Eff. 07-01-	0	1,324	1,324	1,324	1,324	1,324
1337 -	Sr Info Sys Analyst (Spec) (Eff. 07-01-	0	1,375	1,375	1,375	1,375	1,375
1340 -	Sr Info Sys Analyst (Supvr) (Eff. 07-01-	0	340	340	340	340	340
1367 -	Sys Software Spec III (Tech) (Eff. 07-01-	0	266	266	266	266	266
1373 -	Sys Software Spec II (Tech) (Eff. 07-01-	0	81	81	81	81	81
1387 -	Dp Mgr IV (Eff. 07-01-2016)	0	215	215	215	215	215
1393 -	Dp Mgr III (Eff. 07-01-2016)	0	392	392	392	392	392
1470 -	Assoc Info Sys Analyst (Spec) (Eff. 07-01-	0	67	67	67	67	67
1559 -	Sys Software Spec III (Supvry) (Eff. 07-01-	0	93	93	93	93	93
1728 -	Exec Asst (Eff. 07-01-2016)	0	46	46	46	46	46
4800 -	Staff Svcs Mgr I (Eff. 07-01-2016)	0	71	71	71	71	71
4802 -	Staff Svcs Mgr III (Eff. 07-01-2016)	0	182	182	182	182	182
5142 -	Assoc Pers Analyst (Eff. 07-01-2016)	0	31	31	31	31	31
5157 -	Staff Svcs Analyst (Gen) (Eff. 07-01-2016)	0	46	46	46	46	46
5284	Assoc Budget Analyst (Eff. 07-01-2016)	0	31	31	31	31	31
5393 -	Assoc Govtl Program Analyst (Eff. 07-01-	0	62	62	62	62	62
6075 -	Info Tech - Proj Director (Eff. 07-01-2016)	0	133	133	133	133	133
Total Salaries and Wages		**$0**	**$4,793**	**$4,793**	**$4,793**	**$4,793**	**$4,793**

Staff Benefits		CY	BY	BY+1	BY+2	BY+3	BY+4
5150350 -	Health Insurance	0	1,086	1,086	1,086	1,086	1,086
5150600 -	Retirement - General	0	1,230	1,230	1,230	1,230	1,230
Total Staff Benefits		**$0**	**$2,316**	**$2,316**	**$2,316**	**$2,316**	**$2,316**
Total Personal Services		**$0**	**$7,109**	**$7,109**	**$7,109**	**$7,109**	**$7,109**

A. Budget Request Summary

This Budget Change Proposal (BCP) requests an increase of $8,007,327 in Office of Systems Integration (OSI) expenditure authority and 2.0 permanent positions in 2016-17 related to the transfer of 58.0 Project staff to OSI from Covered California.

The increase of $8,007,327 is necessary to support the continued activities for the California Healthcare Eligibility, Enrollment and Retention System (CalHEERS). Of this amount, $7,742,125 is related to the transfer of 58.0 Project staff positions from Covered California to OSI and the remaining $265,201 is for new administrative positions.

It is proposed that OSI not only continue to provide oversight services for the design, development, implementation and operation/maintenance of the Project, but that the OSI responsibilities increase to include full day-to-day Project Management (PM) of the Project staff and activities. As a result, these responsibilities will be transferred from Covered California to OSI. These additional duties also require increased administrative support related to the transfer of the Project positions.

The costs will continue to be reimbursed by Covered California and the Department of Health Care Services (DHCS).

B. Background/History *(Provide **relevant** background/history and provide program resource history. Provide workload metrics, if applicable.)*

With the passage of the federal Affordable Care Act (ACA) in March 2010, states were required to either establish a health benefit exchange by January 2014 for the public to enroll in private and subsidized health insurance programs or rely on the federal government's exchange to provide these services. California enacted legislation (Chapters 655 and 659, Statutes of 2010 (Perez & Alquist)) created a State-based health benefit exchange known as the California Health Benefit Exchange (hereafter referred to as Covered California). Covered California and the DHCS established the CalHEERS Project to develop an automated solution to meet the requirements of the ACA.

Covered California and the DHCS acquired Accenture, LLP, as a prime vendor to develop the CalHEERS solution that supports the implementation of a statewide health care exchange and designated the OSI to provide oversight services during the implementation and system stabilization of the CalHEERS solution.

In order to provide oversight services for the Project, OSI requires reimbursement from Covered California and the DHCS for the associated costs identified.

C. State Level Considerations

This proposal is consistent with current State law (Chapters 655 and 659, Statutes of 2010) that requires the State to establish a health benefits exchange.

This proposal has a significant effect on the operations of other State departments including the Department of Social Services which operates the State Automated Welfare System, the DHCS which operates the Medi-Cal program, and Covered California. OSI's expertise helps these departments interface with the Project and operate their existing programs, which deliver health and human services to some of California's most vulnerable citizens.

This proposal extends the OSI involvement in the Project and assists the DHCS and Covered California by providing PM services in addition to the oversight services previously provided.

D. Justification

This is a large-scale, high-profile project with the potential of significant impact to the citizens of California. The OSI requires expenditure authority to provide services for the Project.

Currently, Covered California retains the Project staff for CalHEERS, including the recruitment and management of positions.

Both program sponsors, Covered California and DHCS, have determined that having a third party, like OSI, manage the day-to-day activities of the project would be beneficial to both sponsors. OSI would be able to apply best practices and lessons learned from both current and prior engagements in order to provide greater efficiencies to the Project and allow the program departments to focus on the program needs and how best to accommodate those needs within the Project.

This proposal would transfer Project positions established at Covered California to OSI. In addition, the proposal requests corresponding administrative resources to support the transferred positions.

Project Staff Positions - $7.7 Million

The Project staff to be transferred to OSI consists of 58.0 positions. An increase in OSI expenditure authority of $7,742,125 is required to support the transfer of the Project staff positions from Covered California to OSI. The staff would become employees of OSI, but would remain at their current physical location at the Project office and continue to perform the same functions.

These 58.0 positions form the entire Project team across the following functional areas as identified in Exhibit A (CalHEERS Project Organizational Chart) and are in addition to the 6.0 Project positions already authorized for OSI:

- Executive Management – 3.0 staff
  - Project Director
  - Assistant Project Director
  - Executive Assistant
- Operational Readiness - 12.0 staff
- System Development - 16.0 staff
- Operations - 9.0 staff
- Project Management Office - 13.0 staff
- Procurement - 5.0 staff

Administrative Staff Positions - $265,201

In addition, 2.0 positions and an increase in OSI expenditure authority of $265,201 is being requested to provide direct administrative support as a result of both the proposed addition of 58.0 new positions to the OSI organization and increased Project workload. These are new resources not previously anticipated and would be housed at OSI headquarters.

Also as the result of the proposed position transfer, there are increased indirect OSI administrative support costs estimated at $1.5 million, which will be allocated to the Project according to OSI's federally approved cost allocation methodology. Although this is an increase to the Project budget, there is no net increase to OSI expenditure authority as the allocation is merely a redistribution of OSI indirect administrative services costs amongst all OSI projects which results in a corresponding decrease in the allocations to other projects.

The administrative resources requested are outlined below. Additionally, Exhibit B provides a detailed workload analysis for each position.

Fiscal and Legislative Services Division – Associate Budget Analyst (0.5 PY)

This resource is in addition to 1.0 PY previously approved for accounting functions. However, there is additional workload associated with budgeting and legislative analysis related to the Project. Budgeting activities for the Project are complex due to the multi funding appropriations supporting the Project activities. The OSI Budget Analyst is responsible for performing all State budgetary responsibilities for the Project. The budget analyst will oversee the coordination, development, and preparation of resource requests for inclusion in the Governor's Budget and May Revision for the OSI and DHCS appropriations. The position also works with the Covered California Financial Management Division. The budget analyst will also be responsible for the review and analysis of all State and federal budgetary documents that impact the Project. These documents include, but are not limited to: Implementation and/or Operational Advance Planning Documents, Budget Change Concepts, Budget Change Proposals, Local Assistance documents, Spring Finance Letters, and other budgetary control documents. The position also is responsible for coordinating legislative analysis for legislation which stands to impact the Project and the various program departments.

Human Resources Division – Associate Personnel Analyst (0.5 PY)

This is a new resource and is needed to support the addition of the 58.0 Project staff to OSI. The Human Resources Analyst will provide expertise in State laws and control agency rules and regulations pertaining to a variety of organizational staffing needs and employee issues. The APA performs the most responsible, varied and complex technical work in the areas of Classification and Pay, Delegated Personnel Program Compliance Management, Selection and Recruitment, CEA and Exempt Position Requests, Position Control, Labor Relations, Training, Workforce Planning, Organizational Change Management, Benefits, Equal Employment Opportunity Program, Reasonable Accommodation and Worker's Compensation. As the APA, they will create organizational staffing models, create duty statements, prepare justifications for classifications with exceptional allocations, prepare and audit recruitment documents that include application screening criteria, interview questions and other associated materials, review applications to ensure candidates meet minimum qualifications for self-service delegated testing, analyze pay scales, create and manage official position records, respond to employee inquires or official grievances related to Memorandum of Understanding and Bargaining Unit agreements, ensure any work related injuries or accommodations are managed, develop upward mobility and professional development mandated and job-related training programs, proactively manage change management activities related to on-boarding, communication and management needs. This position is the primary point of contact for all official Human Resources personnel management functions between the Project team and OSI headquarters.

Portfolio Management Office – Senior Information Systems Analyst (0.5 PY)

This is a new resource and is needed to support the addition of the 58.0 Project staff to OSI. The Sr. ISA will work directly with the Project Team through maintenance and operations (M&O) to ensure required documentation and plans align to PM best practices, policies, regulations, and guidelines, and that supportable strategies are proposed. The Sr. ISA will conduct portfolio oversight and governance activities including OSI portfolio reporting, interfacing with the control agencies on processes and approvals, and reviewing and approving Project documents. The Sr. ISA will lead on organizing the collection of lessons learned from Project M&O activities for analysis and process/product improvements. The Sr. ISA will also oversee Project assimilation through monitoring transition activities, adjusting the approach as needed and post-transition planning.

Portfolio Management Office – Senior Information Systems Analyst (0.5 PY)

This is a new resource and is needed to support the addition of the 58.0 Project staff to OSI. The Sr. ISA data analyst will operate as the single point of contact for all Project data inquires. The analyst will coordinate, track and manage all requests submitted to the Project. The Sr. ISA data analyst will facilitate direct interaction with State departments, local government entities and federal partners. The Sr. ISA data analyst is responsible for analyzing requests, identifying appropriate data

sources and ensuring the required data sharing agreements are in place. The Sr. ISA data analyst will also monitor timely processing of the requests and report monthly to Project team and executives.

The expenditure authority need of $7,742,125 related to the transfer of 58.0 Project staff positions is not an increase to Project costs, but rather a shift of PM activity to OSI. The additional expenditure authority of $265,201 for administrative positions was not previously anticipated and, along with the allocation of indirect administrative costs, is an increase to the cost of the Project.

E. **Outcomes and Accountability** *(Provide summary of expected outcomes associated with Budget Request and provide the projected workload metrics that reflect how this proposal improves the metrics outlines in the Background/History Section.)*

The proposal is designed to achieve continued success in the transition into operations and maintenance. As required of all information technology projects, the progress and status of Project activities will be reported via project approval documents and project status reports to both federal and State stakeholders. The Project must meet the business needs of our partners and allow for Californians to easily enroll in appropriate health coverage. The ultimate success of the Project will be its ability to get more Californians enrolled in affordable health care that improves their health status and quality of life.

F. **Analysis of All Feasible Alternatives**

Alternative #1: Approve the total increase of $8,007,327 in OSI expenditure authority and 2.0 permanent positions to affect the transfer of Project staff from Covered California and provide for additional administrative resources.

Pros:

- Ensures adequate resources to complete the transition to operations and maintenance.
- Ensures necessary resources available to manage the CalHEERS application in the operations and maintenance phase.
- Facilitates the application of OSI expertise and knowledge transfer.
- Reduces significant risk to the ongoing operations and maintenance activities and application stability.

Cons:

- Increases the size of the OSI administrative services division.

Alternative #2: Do not approve the total increase in OSI expenditure authority for the transfer of Project staff from Covered California or additional administrative resources.

Pros:

- Does not increase the size of the OSI administrative services division.

Cons:

- Does not ensure adequate resources to complete the transition to operations and maintenance.
- Does not ensure necessary resources available to manage the Project application in the operations and maintenance phase.
- Does not facilitate the application of OSI expertise and knowledge transfer.
- Poses significant risk to the ongoing operations and maintenance activities and application stability.

G. Implementation Plan

OSI intends to implement the proposal effective July 1, 2016, or upon passage of the 2016 Budget Act.

H. Supplemental Information *(Describe special resources and provide details to support costs including appropriate back up.)*

Facility costs of $20,000 have been included in the cost estimate for the new 2.0 permanent positions being requested to provide administrative services.

I. Recommendation

Approve the request in 2016-17 to increase OSI expenditure authority by $8,007,327 and authorize 2.0 permanent positions.
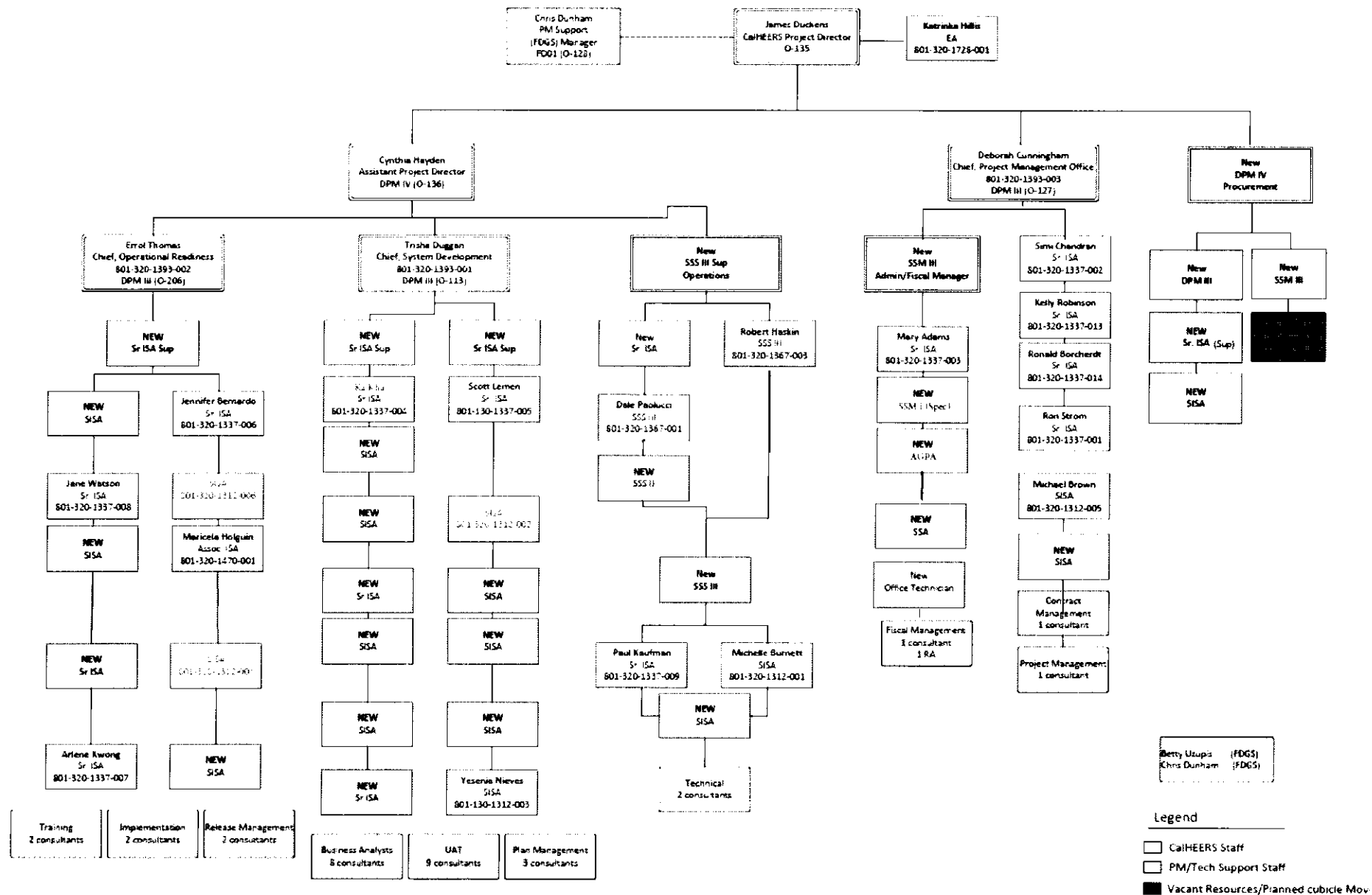
0530-002-BCP-BR-2016-GB

CalHEERS Budget Change Proposal

Exhibit A

-

Project Organizational Chart

Date: _____ 12/31/14 _____

CalHEERS Project

Chris Dunham
PM Support
(FDGS) Manager
FD01 (O-128)

James Duckens
CalHEERS Project Director
O-135

Katrinka Hillis
EA
801-320-1728-001

Cynthia Hayden
Assistant Project Director
DPM IV (O-136)

Deborah Cunningham
Chief, Project Management Office
801-320-1393-003
DPM III (O-127)

New
DPM IV
Procurement

Errol Thomas
Chief, Operational Readiness
801-320-1393-002
DPM III (O-206)

Trisha Duggan
Chief, System Development
801-320-1393-001
DPM III (O-113)

New
SSS III Sup
Operations

New
SSM III
Admin/Fiscal Manager

Simi Chandran
Sr ISA
801-320-1337-002

New
DPM III

New
SSM III

NEW
Sr ISA Sup

NEW
Sr ISA Sup

NEW
Sr ISA Sup

New
Sr ISA

Robert Haskin
SSS III
801-320-1367-003

Mary Adams
Sr ISA
801-320-1337-003

Kelly Robinson
Sr ISA
801-320-1337-013

New
DPM III

New
SSM III

NEW
SISA

Jennifer Bernardo
Sr ISA
801-320-1337-006

NEW
Sr ISA
801-320-1337-004

Scott Lemen
Sr ISA
801-130-1337-005

Dale Paolucci
SSS III
801-320-1367-001

NEW
SSM I (Spec)

Ronald Borcherdt
Sr ISA
801-320-1337-014

NEW
Sr ISA (Sup)

Jane Watson
Sr ISA
801-320-1337-008

SISA
801-320-1312-006

NEW
SISA

NEW
801-320-1312-002

NEW
SSS III

NEW
AGPA

Ron Strom
Sr ISA
801-320-1337-001

NEW
SISA

NEW
SISA

Maricela Holguin
Assoc ISA
801-320-1470-001

NEW
Sr ISA

NEW
SISA

NEW
SSA

Michael Brown
SISA
801-320-1312-005

NEW
Sr ISA

SISA
801-320-1312-007

NEW
SISA

New
SSS III

New
Office Technician

NEW
SISA

NEW
Sr ISA

Arlene Kwong
Sr ISA
801-320-1337-007

NEW
SISA

Paul Kaufman
Sr ISA
801-320-1337-009

Michelle Burnett
SISA
801-320-1312-001

Contract Management
1 consultant

NEW
Sr ISA

NEW
SISA

NEW
SISA

Fiscal Management
1 consultant
1 RA

Project Management
1 consultant

Yesenia Nieves
SISA
801-130-1312-003

NEW
SISA

Technical
2 consultants

Training
2 consultants

Implementation
2 consultants

Release Management
3 consultants

Business Analysts
8 consultants

UAT
9 consultants

Plan Management
3 consultants

Betty Uzupis   (FDGS)
Khris Dunham   (FDGS)

Legend

☐ CalHEERS Staff
☐ PM/Tech Support Staff
■ Vacant Resources/Planned cubicle Mov

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CalHEERS Budget Change Proposal

Exhibit B

-

Administrative Services Workload Analysis

Associate Budget Analyst - Workload Analysis
Fiscal and Legislative Services Division
CalHEERS Project

Responsibilities	Hours to Complete Task	Number of Tasks Per Year	Total Hours Needed Per Year
Review and analyzes all budgetary documents that impact the Project. These documents include, but are not limited to: Advanced Planning Documents, Budget Change Concepts, Budget Change Proposals, Budget Revisions, Spring Finance Letters, Budgetary control documents, and various federal documents.	20	12	240
Acts as the Budget Liaison for the Health and Human Services Agency (Agency), Department of Finance (DOF), California Technology Department (CDT), Legislative Analyst's Office (LAO), and Legislature for all budget related information regarding the Project.	10	12	120
Preparation of the funding and expenditure detail for the inclusion in the Governor's Budget and May Revision for OSI, CDSS, DHCS, and HBEX. This is a challenging process when dealing with a Project that includes distinct programs, multiple appropriations and funding streams.	10	12	120
Preparation and analysis of expenditure projections, Out-Of-State travel Blanket Coordination, Schedule 8 program and personal services allocations.	6	12	72
Provide technical budget assistance as well as analytical advice on recommended approaches to fiscal challenges at the Project level, and assist in the review of proposed legislation and the preparation of the fiscal impact to Medi-Cal Eligibility and State Health and Welfare Benefits.	7	12	84
Assists the Budget Officer, Executive Management, and Project Management in developing an effective course of action in budget planning and maintenance.	7	12	84
Prepare special budgetary information as requested by various entities with include Agency, DOF, CDT, the LAO and the Legislature.	7	12	60
Prepare and process transfer of budget allotments and review purchase estimates, printing requisitions, personnel documents, and contracts.	5	12	60
Prepare documents and memorandums regarding appropriate action of fiscal and personnel transactions requiring OSI approval or submittal to DOF.	5	12	60
Provide monthly fiscal management reports to the Project. Respond to requests from Project staff for customized budgetary reports.	5	12	60
Total Annual Hours			**960**
Total Positions			**0.5**

Associate Personnel Analyst - Workload Analysis
Human Resources Division
CalHEERS Project

Responsibilities	Hours to Complete Task	Number of Tasks Per Year	Total Hours Needed Per Year
Provide assistance to managers, employees, control agencies, and others on varied and/or sensitive/complex personnel management matters to resolve issues, provide information, options, and/or recommendations, etc. using various personnel references/policies (e.g., Memorandum of Understanding(MOUs), CALHR laws and rules, Personnel Management Policy and Procedures Manual, Selection Manual, etc.) as needed and/or upon request.	26	5	130
Work collaboratively with hiring managers to analyze, write, and complete Requests for Personnel Actions, justification for positions, create duty statements, and create current and proposed organization charts. Conduct analysis and formulate recommendations to properly classify positions consistent with the state classifications and pay plan utilizing desk audits, CALHR classification specifications, pay scales and C&P manual, allocation guidelines, etc., as needed and/or upon request. Demonstrate knowledge of classifications used in designated unit/project to assist managers with appropriate position requests, justifications and duty statements.	26	5	130
Consult with and advise managers and supervisory staff, on the interpretation and application of civil service, laws, rules, and personnel policies, etc., utilizing reference materials (e.g., laws, rules, regulations, etc.) as needed and/or upon request.	26	5	130
Author proposed personnel actions (e.g., appointments, transfers, out-of-class, training and development assignments, Hire-Above-Minimum, salary determination, etc.) to ensure conformity with regulations, classification and pay standards or good personnel practices using established guidelines, laws, rules and department policies and procedures as needed and/or requested by management.	26	5	130
Develop materials/tools to train individuals/groups in the appropriate interpretation and application of policies, procedures, guidelines, laws and rules, regulations relating to personnel matters utilizing various resources (e.g., expertise, manuals, laws and rules, desk audits, staff/consultants, job analysis, etc.) as needed and/or requested by management.	26	3	78
Provide training, instruction and/or guidance in the performance of personnel related tasks using various resources (e.g., expertise, policies, procedures, laws, rules, etc.).	26	3	78
Develop, maintain, and monitor a Training Plan. Design, coordinate, and provide training opportunities to employees. Conduct research and perform detailed and complex data analysis on training needs assessments/gap assessments in order to recommend future training needs; additionally, develop evaluation tools to measure training outcome and behavioral and learning transfer performances. Lead in the development of training	26	3	76

strategies to ensure employees gain knowledge, skills, and abilities, to help them with job readiness, and develop processes to allow employees the opportunity to fully develop knowledge, skills and abilities that support successful IT projects.			
Conduct research in areas of personnel matters (e.g., use of a specific classification, position allocation decisions, appropriate list usage, transfer of list eligibility, etc.) for appropriateness of application in compliance with laws, rules, regulations, policies, procedures, etc., utilizing various resources (e.g., expertise, policies, procedures, laws, rules, etc.).	26	2	52
Author adverse actions, rejections on probation, expectations memos, etc. and accompanying documents to take disciplinary action on employees using MOUs, laws, rules, regulations, policies, procedures, etc., upon request.	26	2	52
Consult with managers and supervisors on inappropriate employee behavior to ensure the situation is handled in a constructive manner (e.g., adverse action, employee counseling record, Memo of Expectations, etc.) and in compliance with MOUs, laws, rules, regulations, policies, procedures, etc., as needed and/or upon request. Advise management on issues involving progressive discipline and corrective actions throughout the preventive, corrective and adverse action phases. Assist managers in preparing and gathering written documentation to support disciplinary issues.	26	2	52
Position Control (review of monthly periodic position reports, change of Established Position Form 607 and maintenance of position card file). Act as primary subject matter expert with OSI Fiscal for Schedule 8 position reconciliation, initiating justifications and position tracking.	26	2	52
Total Annual Hours			**960**
Total Positions			**0.5**

Sr. Information Systems Analyst - Workload Analysis
Portfolio Management Office Division
CalHEERS Project

Responsibilities	Hours to Complete Task	Number of Tasks Per Year	Total Hours Needed Per Year
Integrate Project into the OSI portfolio. Work directly with the Project Team through M&O to ensure required documentation and plans align to PM best practices, policies, regulations, and guidelines, and that supportable strategies are proposed. Includes providing Quality Assurance on external Project documents such as FY 2017-18 BCP and IAPDU.	8	12	96
Conduct portfolio oversight and governance activities including OSI portfolio reporting, interfacing with the control agencies on processes and approvals, and reviewing and approving Project documents.	26	12	312
Lead on organizing the collection of lessons learned from Project M&O activities for analysis and process/product improvements. CalHEERS is a unique project from OSI or reportable projects in general as well as its multidepartment aspects. OSI will take the opportunity for an in depth look at lessons learned.	10	12	120
Project Lead on developing, piloting and implementing Transition Plan objectives, roles and responsibilities, risks and issues and mitigation plan(s), organizational readiness/change management requirements, knowledge management transfer, budget, schedule, milestones, documentation and turnover.	16	12	192
Oversee Project assimilation through monitoring transition activities, adjusting the approach as needed and post-transition planning.	20	12	240
Total Annual Hours			**960**
Total Positions			**0.5**

Sr. Information Systems Analyst - Workload Analysis
Portfolio Management Office Division
CalHEERS Project

Responsibilities	Hours to Complete Task	Number of Tasks Per Year	Total Hours Needed Per Year
Responsible for coordinating, tracking and managing all data requests.	1	200	200
Directly interacts with state departments, local government entities and federal partners.	2	50	100
Analyzes all requests to identify appropriate data sources to satisfy requests and ensure the required data sharing agreements are in place.	3	200	600
Monitor timely processing of the requests and report monthly to Project team and executives.	5	12	60
Total Annual Hours			**960**
Total Positions			**0.5**